

# Document Permission Categories

## SUMMARY

Learn about *Document Permission Categories*.

## Introduction

*Document Permission Categories* let the system know who should be able to view a doc on a transaction. Every doc added to a transaction must have a *Permission Category*.

*Permission Categories* are an added layer of security that allow you to make each doc accessible (or inaccessible) to agents and admins who have access to the transaction.

Below is a list of who has visibility for each *Permission Category*:

- *Office* - Office Staff
- *Listing* - Listing Agents and Office Staff
- *Sale* - Listing Agents, Buying Agents, and Office Staff
- *Buyer* - Buying Agents, and Office Staff
- *Public* - Listing Agents, Buying Agents, and Office Staff
- *Private* - The user that set the doc to *Private*, and Office Staff



In order to view docs on a transaction, agents or admins must first have access to view the transaction.

## Set Permission Categories

The system already comes loaded with all the possible *Permission Categories* you'll need, so there's no setup needed for the categories themselves. However, we recommend automating the *Permission Category* selection process by presetting *Permission Categories* for each of your *Standardized Doc Names*, when applicable.

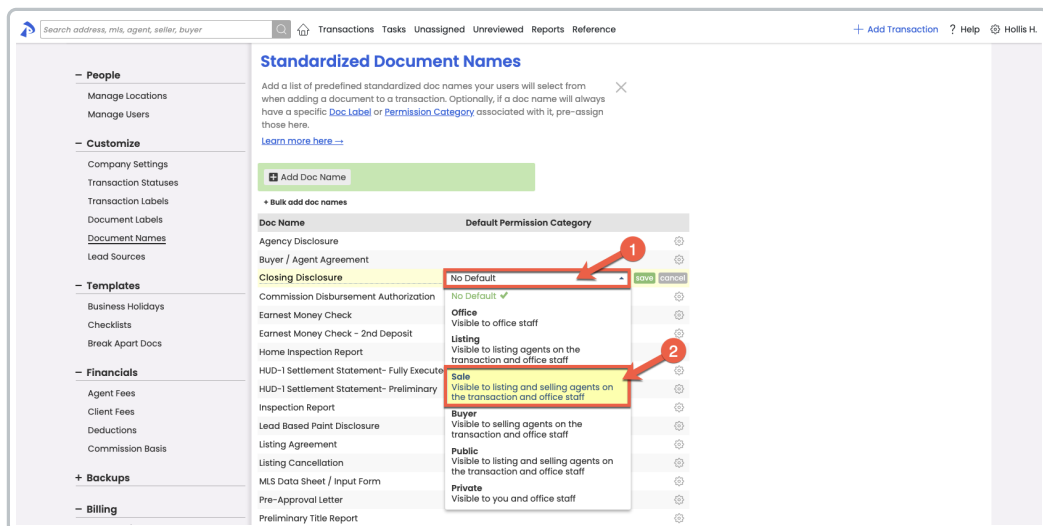
### Pre-set Permission Categories for Document Names

To save time and help agents and admins comply with your company's document access protocol,

you can preset *Permission Categories* for your *Standardized Doc Names*. When a *Standardized Doc Name* that has a preset *Permission Category* is applied to a doc, the *Permission Category* will be automatically applied.

To pre-set a *Permission Category* for a document name:

- 1 Go to the *Standardized Doc Names* area by clicking your name in the upper-right, then [Admin / Settings], and select [Document Names] from the *Customize* section of the left menu.
- 2 To the right of a *Document Name*, click the gear and select [Edit].
- 3 In the *Default Permission Category* column, select the dropdown and choose your preferred *Permission Category*.
- 4 In the *Default Permission Category* column, select the dropdown and choose your preferred *Permission Category*.



- 5 Click [Save]. The *Document Permission Category* will be pre-associated to the *Document Name* so that whenever a doc is given that name, the pre-associated *Permission Category* will be automatically applied.

## Apply Permission Categories to Docs

**Who Can Do This?** Agents and admin with permission to *Assign Docs* have the option to set a document's *Permission Category*.

- Agents can only set *Permission Categories* to categories they have access to view, and only on documents assigned by them that have not yet been marked as *Reviewed*.
- Admins can set *Permission Categories* of all documents.

## Set a Document's Permission Category

Whenever a doc is added or updated on a transaction, a *Permission Category* must be set for the doc to let the system know who should be able to view the doc.

Learn more about [Assigning Docs to Transactions](#) →

**Assign Document to a transaction**

**Back to Step 1** Choose a transaction. ?

Suggested Transaction	Status	Complete	Agents	Location	Close Date
<a href="#">assign</a> 123 Main Street <a href="#">L+B</a> <a href="#">Condos/Townhouses</a>	Active	4/9		Canal La...	

Want to assign to a different transaction? [View all transactions](#) →

**Step 2** View, name, and categorize your doc. ?

File	Email Subject or Source	Document Name	Permission Category	Reviewed
<a href="#">Agreement_09132022.pdf</a>	HelloSign	Agreement 09132022	<b>Office</b> Visible to office staff <b>Listing</b> Visible to listing agents on this transaction and office staff <b>Sale</b> Visible to listing and buying agents on this transaction and office staff <b>Buyer</b> Visible to buying agents on this transaction and office staff <b>Public</b> Visible to listing and buying agents on this transaction and office staff <b>Private</b> Visible to Hollis Holcomb (you) and office staff	<input type="checkbox"/> <a href="#">sign Doc</a>

## Bulk Change Document Permission Categories

When documents were assigned to the wrong *Permission Category* or need to be moved to a different *Permission Category* as part of your transaction workflow, you can bulk update them with just a couple clicks.

To update *Permission Categories* of multiple docs at once:

- 1 Above the *Docs Area* on a transaction, click the
- 2 Click the checkboxes next to the docs whose *Permission Categories* you'd like to update.
- 3 Select your desired *Permission Category*, then [Update Permission Category]. The docs will be moved to your chosen *Permission Category*.

Search address: mls, agent, seller, buyer

Transactions Tasks Unassigned Unreviewed Reports Reference

+ Add Transaction ? Help Hollis H.

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**View Transaction**

Edit Transaction

Upload Docs

Assign Docs

Transaction History

Deleted Docs

Received Emails (0)

Download Transaction

Manage Commissions

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**Checklists** + 44% ✓

— Listing checklist

- Seller's Property Disclosure
- Lead-based Paint Disclosure (if applicable)
- Financial Addendum
- MLS Information 8/29
- Well water Disclosure
- Show completed tasks ...

Add doc name or task

## 123 Main Street

Added on Jun 30, 2022 by Hollis Holcomb  
Last updated just now by Hollis Holcomb

Email docs and notes to this transaction: [g568292-111443-TX-2801@docs.paperlesspipeline.com](mailto:g568292-111443-TX-2801@docs.paperlesspipeline.com)

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**General**

**Status:** Active **Listed On:** Jun 7, 2022 coversheet

**MLS #:** 123123123123

**Label:** Condos/Townhouses

**Side:** Listing

**Location:** Canal Lane

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**Seller & Buyer**

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**Sale & Commission**

**List Price:** \$150,000 **Commission Summary:** 3% for all agents

**Sale Price:** \$123,000

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**More Info** **Admin Info** (only visible to admin staff)

**Lock Box:** ---- **Some default**

**Year Built:** **admin**

**Agent Owned:** **info...**

**HERE**

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**Listing Agents**

Elijah McCoy [hollis+elijah@paperlesspipeline.com](mailto:hollis+elijah@paperlesspipeline.com) 555-555-5555

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Note / Email Add Contact Merge Docs Upload Docs Search Docs

Document Name Added On Reviewed